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ABSTRACT

This paper examines the use of subsidy programs as a payment strategy for assistive devices for individuals with disabilities. The paper defines subsidies, classifies and describes these programs, and identifies commonalities and differences among varied models. Program models include: (1) competitive subsidies offered by private, nonprofit organizations; (2) competitive subsidies to institutions offered by assistive device manufacturers; (3) subsidies offered through the collaborative efforts of business and voluntary organizations; (4) rebates on equipment that enable individuals to obtain a particular product or product line; (5) discounts on telecommunications devices and services; and (6) special events where manufacturers offer discounts. Obstacles to program development, implementation, and evaluation are discussed. The paper also covers philosophical issues raised by providing subsidies to persons with disabilities, and concludes with a consideration of the impact that subsidies have on consumers who receive them. (JDD)

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SUBSIDY PROGRAMS FOR ASSISTIVE DEVICES

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September, 1989

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INTRODUCTION

Who has not felt the impact of modern technology? Microcomputers have transformed the workplace. Remote control units, microwave ovens, cordless telephones, and videocassette recorders (VCR's) are becoming standard conveniences in many homes, influencing the lifestyles of disabled and non-disabled consumers alike.

Just as the number of devices for the general consumer market has increased, so too has there been rapid growth in the availability of technologies used by persons with disabilities. Almost twenty years ago, the Optacon, the first commercially obtainable high technology print reading device for blind and visually impaired persons, was introduced. The landscape of the assistive device marketplace has changed dramatically since then. Today, add-on speech synthesizers, augmentative communication devices, braille printers, and computer software and hardware are enabling persons with disabilities to participate more fully in all aspects of life.

However, availability alone does not ensure that individuals with disabilities have access to products. Often, technologies are too expensive for those who can benefit from them. For example, speech systems connected to computers can increase the purchase price of the product by anywhere from $600 to $4,500. Many funding sources will not pay for such equipment. Cost is a serious barrier to the dissemination and use of assistive devices. Given this situation, what methods exist to help persons with disabilities enter the marketplace to obtain such products?

The purpose of this document is to examine one set of alternative payment strategies for assistive devices, subsidy programs. It will define what subsidies are, classify and describe these programs, and identify commonalities and differences among varied models. Obstacles to program development, implementation, and evaluation will be discussed. The document also will cover philosophical issues raised by providing subsidies to persons with disabilities. Finally, the analysis will conclude with a consideration of the impact that subsidies have on consumers who receive them. This document is part of a series of monographs on alternative payment strategies that can be used in the acquisition of assistive technology.(1) Through these continuing information dissemination efforts, the goal is to support and strengthen existing subsidy programs, and to encourage the growth of initiatives elsewhere.

WHAT ARE SUBSIDY PROGRAMS FOR ASSISTIVE TECHNOLOGIES?

Subsidy programs exist to make products available to disabled consumers who may have difficulties paying for devices. These programs lower the cost of equipment or provide it for free. A subsidy may come in the form of a grant, a discount, or a rebate. It may target a specific product or a product line. It may cover a variety of devices. Those eligible to receive subsidies for assistive technologies may include individuals with specific disabilities, those with a broad range of disabilities, those seeking to obtain or retain employment, those pursuing educational goals, those residing within a specific area, those meeting certain financial criteria, families who have disabled relatives, or institutions serving persons with disabilities. Subsidy programs have been created to promote broader distribution and increased utilization of devices than might otherwise occur.

OVERVIEW OF SUBSIDY PROGRAMS

Through interviews and written materials, this study uncovered twenty-one subsidy programs for disabled consumers. This listing is by no means exhaustive, as foundations may provide assistive device subsidies occasionally or local programs may exist that are difficult to locate. Subsidies were developed in part because of the growth of the assistive device marketplace. Often, such products are not funded by rehabilitation or medical programs.

Many types of organizations offer subsidies. They may be provided through government sources, and these programs have been described in monographs in this series and other publications.(2) The subsidies covered in this study are offered by community service organizations, charities, manufacturers, partnerships between device manufacturers or retailers and voluntary organizations, private, non-profit corporations, and even public utility regulating agencies. Eligibility requirements differ and variations exist as to how they are administered and funded. Numbers of people served depend on the financing mechanism, the products subsidized, and program structure.

PROGRAM MODELS

In order to understand the growing universe of subsidy programs, it is helpful to classify and to describe what currently exists. The programs studied fall within these classifications and sub-categories:

1. competitive subsidies offered by private, non-profit organizations;
2. competitive subsidies to institutions offered by assistive device manufacturers;
3. subsidies offered through the collaborative efforts of business and voluntary organizations including:
   - formalized partnerships;
   - voluntary organization initiatives;
   - subsidies available through membership discounts;
   - non-competitive subsidies offered by a private non-profit organization created to market discounted equipment;
4. rebates on equipment that enable individuals to obtatin a particular product or product line;
5. discounts on telecommunications devices and services;
6. special events where manufacturers offer discounts.

An examination of these classifications and the programs that fall within each category will be conducted. Common features and differences among these initiatives will be identified.

COMPETITIVE SUBSIDIES OFFERED BY PRIVATE, NON-PROFIT ORGANIZATIONS

Several non-profit organizations raise or set aside monies to subsidize equipment. Individuals (and in some cases, institutions) compete for available funding by completing applications, writing proposals, and sometimes, by participating in interviews to define and explain what assistive technology they need and why. These programs do not require that applicants seek specific products. In this model, the end user is responsible for identifying the equipment need, conducting research on its cost, and justifying the selection of a technology.

Since these organizations have limited funds, not all applicants receive subsidies. Also, some programs require that potential applicants contact local vocational rehabilitation offices (VR) before they submit their proposals. Candidates must ascertain whether they are eligible to receive equipment under VR auspices. Other subsidy programs work with VR agencies to provide support.

Grants are awarded to those who develop detailed proposals that highlight the practical applications of the device to their circumstances. Some cover the total cost of the equipment; others pay only a portion requiring that the applicant finance or find a way to cover the remaining expenses. Some programs offer several financing techniques, including no or low-interest loans.

Descriptions of six competitive subsidy programs created by these non-profit organizations are presented:

- Associated Services for the Blind;
- Braille Institute of America, Inc.;
- Opportunities for the Blind;
- Foundation for the Advancement of the Blind, Inc.;
- Blind San Franciscans, Inc.;
- United Cerebral Palsy Association of Western New York, Inc.

Information about a subsidy program of the National Captioning Institute, Inc. that intermittently provides services is also included. Lessons these organizations have learned from the experience of developing, implementing, and maintaining subsidy programs are highlighted.

Associated Services for the Blind

Associated Services for the Blind (ASB) located in Philadelphia, Pennsylvania has the oldest ongoing subsidy program for assistive devices, its Electronic Aids Program. Originally, it received financial assistance from the Pew Charitable Trusts and the Nevil Trust to support training on and the purchase of Optacons for blind and visually impaired persons. The ASB program began in 1974. Starting in the late 1970's and early 1980's, the program also provided grants to help those paying out of pocket to purchase VersaBrailles, a computer that has a braille keyboard for input and provides a paperless, mechanical braille display.

As the market of devices grew, ASB expanded its subsidy program to cover products that applicants sought, such as Braille printers, speech synthesizers for computers, closed circuit access reading machines, and Braille 'n Speak. Eligible applicants for ASB subsidies are blind and visually impaired persons, 18 and older, who come from all over the country. They must seek equipment for personal independence in educational or vocational pursuits. Applicants do not need to meet financial criteria to receive consideration. However, they must be ineligible to obtain devices through state vocational rehabilitation services.

Applicants complete a written application which seeks personal background information, data on equipment needs and training, how clients will pay their portion of a device's cost, what the device will be used for, and why applicants chose that technology in lieu of other equipment.

For individuals who receive funding, ASB provides approximately 50% of the purchase price of a device up to a maximum subsidy of $2,000. It is the client's responsibility to find ways to pay for the remainder of the equipment's cost. If payment is a problem, Associated Services for the Blind recommends that the individual contact local charities and service organizations (like Kiwanis or Lions Clubs), or pursue bank loans.

In calendar year 1988, 80 people received devices with ASB's help. By the end of 1989, Associated Services for the Blind expects to provide support to some 80 to 90 applicants.

Outreach or program marketing is accomplished by word of mouth. Many device manufacturers are aware of the ASB program and may recommend that potential customers apply for a subsidy. Publicity is also generated through publications available within the blind community and through organizations that serve this target population.

Associated Services for the Blind sends out from 300 to 500 applications each year; about 150 to 300 come back. Approximately 46% of those applicants are successful. A panel evaluates the applications. Those who receive subsidies explain why a specific device will make a difference in their pursuit of educational or vocational goals, show they have conducted research to justify its procurement, and have a concrete plan for financing their portion of the cost. Applicants are encouraged to bargain shop for equipment. Awards are made on a first come, first serve basis, until all funding for the year is given away. Always, more qualified people apply than there are funds available.

Once awards are made, individuals send ASB their portion of the funds, ASB processes the paperwork, and customers receive the equipment directly. No formal follow-up with clients is conducted, although ASB receives thank-you letters and telephone calls from people they have assisted. An evaluation procedure is not in place. Success, however, is shown through increasing demand for the program and ASB's attempts to serve more people each year.

Associated Services for the Blind receives annual support from the Pew Charitable Trusts to keep the subsidy program in existence. Although funding for the program is dependent on an outside resource and the paperwork burden is sizeable in a program of this kind, ASB is committed to helping individuals become self-sufficient through the use of technology. Based on its experience, ASB staff recommend that any organization contemplating offering subsidies have

mechanisms in place to prepare for an onslaught of requests from consumers. Additionally, they encourage consumers to contact public resources (such as state vocational rehabilitation agencies) for financial support before turning to private nonprofit organizations for assistance. They also suggest that sometimes consumers may have unrealistic expectations of subsidy programs or technologies they seek, requiring programs to provide information that clearly states guidelines for successful applications. All these factors should be considered when planning a subsidy program.

Braille Institute of America, Inc.

The Braille Institute of America, Inc. is a private non-profit agency that serves legally blind Southern Californians. It developed a subsidy program after creating its Sensory Aids Learning Center that showcases state-of-the-art equipment in 1982. The Center was established because of interest in technologies expressed by the visually impaired population within the Braille Institute service area and those who work with them. Although no formal study of the situation was made, anecdotal stories showed that many clients wanted devices, but could not afford them. The Institute recognized their clientele needed equipment to pursue vocational goals, so the Board of Directors created an ongoing fund of $150,000 annually, appropriated from bequests and wills, to support a Sensory Aids Financial Subsidy program.

Legally blind residents of Southern California, those traditionally served by the Braille Institute, are eligible to apply for subsidies. Some of the products subsidized include closed circuit televisions, speech synthesizers for computers, VersaBrailles, computer systems with large print output, software, and Optacons. Subsidies cover equipment that allows applicants to remain competitive on the job and to advance professionally. Additionally, applicants who receive job offers on the condition that they procure particular equipment are likely to receive subsidies.

Clients must speak with the Director of Student Services of Braille Institute before they can apply for a subsidy. The application seeks information about individuals' employment history, education, skills and financial status (including data on how applicants plan to pay for their portion of a device's cost), the desired equipment, its purchase price, and its proposed use. Proof of legal blindness is required, as are recommendations from employers, rehabilitation counselors, or other knowledgeable references. All applicants are interviewed by the Sensory Aids Consultant, the Job Placement Coordinator, and the Director of Student Services. Awards are made by the evaluation committee, and applicants are notified by letter.

Successful applicants receive a subsidy covering half of the price of devices costing from $2,000 to $15,000. After applicants contact vendors, place orders and pay their portion of equipment costs, the vendors send invoices to the Institute to complete payment. To date, the Braille Institute has served two hundred fifty-eight persons through its subsidy program.

Outreach about the subsidy program is accomplished through many outlets. The California Department of Vocational Rehabilitation refers potential applicants (both VR clients and those who are ineligible to receive VR services) to the Sensory Aids Financial Subsidy Program. Many learn of the program through the Braille Institute's Sensory Aids Learning Center, its Job Placement Program, or its student population. Word of mouth is another way that potential applicants find out about the subsidy program.

Some follow-up takes place with subsidy recipients but most feedback is informal. Success is measured by the number of people who would be unemployed without the equipment, or whose independence was fostered through the use of technology.

Based on its experience, the Braille Institute Sensory Aids Financial Subsidy Program staff believe the screening process is a crucial component in a subsidy program. Although time consuming, initial telephone interviews assist in screening out inappropriate candidates, e.g., those who may have unrealistic expectations of what technologies can do for them. The face-to-face interview allows Braille Institute staff to evaluate whether the candidate will be capable of using the device sought or whether the equipment cited in the application is the best choice for the individual. Those who seem capable of using equipment to pursue vocational or educational goals, and who have a documented plan for its use and procurement are considered strong applicants. The Braille Institute program has a low rejection rate due, in part, to an effective screening procedure.

Opportunities for the Blind

Opportunities for the Blind provides career-oriented grants to legally blind persons, including funding for aids, appliances, and other special equipment. Robert E. Johnson, an experienced fund-raiser who is blind, organized it in response to budget cuts initiated during the Reagan Administration. Fundraising began in 1981 with direct mail solicitations, and has grown to include foundation and corporate support, and estate giving. Opportunities for the Blind served its first clients in 1982.

Eligible applicants include legally blind U.S. citizens and organizations that serve them. It is a nationwide program, without age or income requirements. Devices sought must assist the users in achieving employment or educational goals. Opportunities for the Blind encourages applicants to pursue traditional sources of funding, such as state vocational rehabilitation monies, but recognizes that such support is often not available. It funds a variety of items such as computer products, software, hardware, large-character display devices, off the shelf technologies, and products like Braille clocks. There is no stated ceiling on the amount of money available for individual subsidies, although the average grant is in the $3,000 range. Opportunities for the Blind does not require that grant recipients pay a portion of the device's cost.

Subsidy candidates fill out a four page application that seeks personal background information, data on individuals' financial situation (including a copy of the most recent tax return or financial statement), and health status. It requires specifics on how much funding is needed, for what, and by when, as well as what other sources of funding are being pursued. Seeking assistance elsewhere does not hinder applicants' chances. For instance, Opportunities for the Blind may fund recipients of the Associated Services for the Blind subsidy program, if it deems that the applicants are worthy. Opportunities for the Blind asks candidates to identify specific career objectives, and how its financial assistance will help them attain those goals. The application also seeks information about candidates' experience, education, and relevant background. Three references and medical documentation certifying legal blindness are needed to complete the application.

Individuals learn about Opportunities for the Blind through its solicitation efforts, press releases, national organizations serving persons who are blind and visually impaired, state vocational rehabilitation agencies, device suppliers, and schools. Approximately 100 applications are completed a year, from 1/3 to 1/2 of them are funded. It is difficult to estimate the number of people who benefit from the program, as often grants are made to organizations which employ and serve persons who are blind and visually impaired (e.g., Volunteers for the Visually Handicapped and the Baltimore Reading Service). When funding is awarded, Opportunities for the Blind sends commitment letters to recipients with a copy to the suppliers. The vendors are asked to send an invoice to the organization.

Opportunities for the Blind asks recipients to report when they have received equipment. No formal tracking system exists, as the organization has not been interested in establishing additional structure to the program. However, the Board of Directors is considering the development of an evaluation process.

Opportunities for the Blind measures success by the growth in the number of grants awarded each year. Opportunities for the Blind perceives its role as that of a catalyst, able to provide funding so that applicants receive devices they need and can use.

Obstacles exist to program development, implementation, and maintenance. It is difficult to provide funding, and monies must be raised to meet the requests of deserving applicants. Additionally, many people expect things to be done for them, whether or not they merit assistance. A recurring problem that Opportunities for the Blind confronts is how to encourage realistic expectations about technology and the possibilities for receiving funding from its program.

Foundation for the Advancement of the Blind, Inc.

The Foundation for the Advancement of the Blind was incorporated in 1984 as a private, non-profit organization that provides funds to help blind and visually impaired people meet unmet needs. Among its projects, it makes funds available to help its applicants finance assistive devices.

Eligible applicants are blind and visually impaired persons who live throughout the United States. No age or residency requirements exist.

Applicants receive guidelines on what to include in a proposal. They must specify what equipment they need, how much money they require to procure it, and how the device will be used. Although the foundation focuses on employment, vocational upgrading, and education, any unmet equipment need of eligible applicants will be considered. As a small organization, it tries to remain flexible.

The Foundation for the Advancement of the Blind provides grants to both individuals and organizations. Its six person Board of Directors meets quarterly or on an as needed basis and on the telephone via conference calls to review applications. The foundation does not put dollar limits on amounts offered, nor does it require that successful applicants pay a portion of a device's cost.

The foundation may fund equipment in full, loan applicants money, or provide additional funds to those who have received subsidies from other programs (e.g., Associated Services for the Blind). Each grant made takes into account the needs of the applicant. Much depends on the amount of grant money that is available and the number of applications the foundation receives and decides to fund.

Devices that are subsidized vary from high technology microcomputers, Braille embossers, and printers to simple products, such as magnifying glasses. Sometimes, funding has included maintenance and repairs, as part of a package deal. Information on the number of grants the Foundation has provided over the years was not made available.

Initially, the Foundation for the Advancement of the Blind, Inc. received the bulk of its funds through telephone solicitation efforts. It is seeking corporate funding and is developing proposals to receive additional monies.

Applicants learn of the program through word of mouth, through American Council of the Blind referrals, and other organizations that serve persons who are blind and visually impaired. Successful applicants may receive funding directly, may be reimbursed by the foundation for outlays of funds, or may receive equipment after a vendor has been paid by the foundation.

No formal evaluation procedure exists. Sometimes, awardees contact the foundation directly to express their appreciation for the assistance provided. The foundation may hear about the status of grant recipients through other sources within the community (e.g., organizations serving these individuals in other capacities).

The Foundation measures the success of its program by the growth in the number of grants it awards. Its major efforts are directed towards fundraising to support its programs.

The organization perceives its strengths to include a lack of red tape and an ability to respond flexibly to funding requests. Problems it has experienced in developing and implementing its program include raising funds and registering as a charity in different parts of the country. The Foundation seeks to expand its efforts.

Blind San Franciscans, Inc.

Several organizations, local in scope, provide equipment subsidies to disabled consumers to promote their employment capabilities. One such group, Blind San Franciscans, Inc. found requests for adaptive equipment increasing among the population it serves, Bay area residents who are blind and visually impaired. In 1982, using donations and bequests, it began to offer a subsidy program for assistive devices.

Blind San Franciscans, Inc. funds from four to eight proposals a year, providing gifts and no interest loans to successful candidates. They receive from ten to twelve applications annually. Applicants submit a written grant proposal, explaining the reason why a particular device is needed, what training

they have had in its use, and its cost. They must also show that they have explored and exhausted all other sources of funding. In addition, they must provide information about their financial situation and employment status. The organization's Board of Directors reviews all applications.

Blind San Franciscans, Inc. seeks to provide support to people who are both job ready and in financial need. The organization will subsidize a device at full or partial cost, depending on the circumstances. Blind San Franciscans, Inc. works with the California Department of Vocational Rehabilitation, when possible.

When funding is awarded, it is given directly to the individual. Although no formal evaluation is conducted, successful applicants are asked to comment on the program. The organization is aware that all awardees are working, and Blind San Franciscans, Inc. measures its success that way.

For a program such as Blind San Franciscans, finding sources of funding to continue to maintain its program is of paramount importance. Additionally, a committed Board of Directors, actively involved in the application review process, makes the subsidy program work.

United Cerebral Palsy Association of Western New York, Inc.

In 1984, the United Cerebral Palsy Association of Western New York, Inc. created an information and referral service on computer needs, the Western New York Resource Center for Applied Technology. Through these efforts, it became clear that individuals with multiple disabilities were often financially incapable of procuring computer equipment that could improve their ability to function independently. In 1988, the Western New York Technological Assistance Fund for Persons with Special Needs (known as TAF) was born.

The competitive grant program is designed to provide computer equipment to Western New York residents with multiple disabilities who demonstrate financial need. Consumers require this equipment to meet educational, vocational, environmental, or communicational goals.

Before individuals can obtain funding, candidates complete a written application form and receive a computer access evaluation of their equipment needs from an outside source (either from UCP or another agency). This requirement exists to ensure that technology requests are appropriate. In addition to the evaluation, the application includes a doctor's letter certifying candidates' disability, the equipment sought, letters of recommendation, and the planned use for the device. Awards are made to those who will best utilize the equipment in their environment.

The program is funded by private individual and corporate donations. All businesses that provide monies are located within the eight counties of Western New York. A lead sponsor, usually a corporate figure, is sought to spearhead fundraising efforts.

Eight people applied in 1988, the first year of the program. One grant was awarded to an eleven year old girl. She received half the cost of computer

hardware and software that had been requested; her parents paid the difference. Financing schemes will vary, according to the needs of individuals chosen to receive grants. Hardware and software are currently covered. The Advisory Board of TAF is negotiating with a vendor to provide maintenance contracts for recipients at a discount.

The application process for 1989 is underway. UCP has received seven applications and the deadline date has not yet arrived.

Outreach is conducted through mailings to local hospitals, agencies, and through the resource center. Newspaper articles have publicized the program and applicants also learn about TAF through word of mouth.

TAF seeks to meet a need, but recognizes it cannot offer grants to everyone who asks for assistance. However, it also perceives its role as providing information and referral. The program directs individuals to other resources in the community that might be able to help them.

Although the program is new, the TAF Advisory Board is planning to evaluate its subsidy efforts. The program will review what happens to grant recipients over time. This assessment will be conducted through a questionnaire that is being developed.

TAF will measure success in several ways. It will examine the long-term gains made by awardees as a direct result of using subsidized equipment. It will track numbers of applicants. An increase in corporate and private sponsors will gauge community support for the program. An additional measure will be the number of grants TAF makes annually.

Staff commented on the difficulties of implementing a subsidy program. All levels of an organization, from the Board of Directors to the staff, must be committed to this initiative. Funding and staffing issues need to be resolved before the project begins.

Board structure can influence the success of a subsidy program. For instance, TAF's Advisory Board was designed to be all inclusive of the community it represents. Members include representatives from the office of vocational rehabilitation, the United Way, the local developmental disabilities council, and corporate leaders. Since the Board is involved in reviewing applications, it is useful that several members have clinical backgrounds.

The creation of an application form that provides reviewers with adequate information on applicants and their needs is important. It facilitates the decision-making process when awarding funds.

Strong outreach is imperative for a program. Brochures and application materials are costly, but necessary components that allow the organization to publicize its efforts and to coordinate the awards process. Corporate support is important to promote fundraising. Internal funding mechanisms become dried out, so business sponsors are needed to keep the fundraising process active and vital.

Much preparation was required prior to TAF's development. Committed staff found it difficult and time-consuming to learn about existing programs. In fact, through the research it conducted, UCP of Western New York Inc. was able to share information about a financial assistance program offered by United Cerebral Palsy of Central Indiana, Inc. in Indianapolis.(3) This background work helped the organization shape its own program. Networking assisted UCP of Western New York in the development, implementation, and evaluation of TAF.

The National Captioning Institute, Inc.'s Project DARE

The National Captioning Institute's Project DARE (Decoders Advance Reading and Education), initiated in March 1986, was an effort to provide closed caption television decoders to financially needy persons who were severely or profoundly deaf. Research showed that many persons who could benefit from using decoders could not afford them, so the National Captioning Institute, Inc. (NCI) -- working with its Corporate Advisory Council -- developed a program that attempted to address those needs.

Project DARE subsidized decoders, requiring grant awardees to provide $35.00 towards their cost. In order to qualify for the subsidy, applicants had to have certification of their disability and meet stringent financial requirements. Project DARE had programs in locations where it was able to raise funds. Over a two year period, the program serviced 2,000 families in fifteen locations including: Detroit, Chicago, Washington, DC, Delaware, New Jersey, Los Angeles, Georgia, Maryland, Louisiana, North Carolina, and Florida.

Administrative responsibilities were burdensome. Ad hoc committees that evaluated potential awardees in the different locations included social workers and teachers. The paperwork was minimal, but not all committee members worked with the same zeal. For a while, NCI was able to underwrite the cost of a staff person to oversee the project with federal funding. But these monies were discontinued.

Fundraising was time-consuming. An average grant proposal generated from $5,000 to $10,000. In 1989, a special movie premiere, sponsored by a Hollywood studio brought NCI $100,000. This amount, generated in one night, was the equivalent of 1/3 of the total funds NCI had been able to raise over a three year period for Project DARE. With these monies, NCI was able to provide 750 decoders to needy children in Los Angeles, a separate effort from its original project in the county. But NCI also found that at least 400 other children were in need of financial assistance. Because of the success of the Hollywood event, NCI has decided to focus its energies on conducting additional movie premieres each year so that a large number of children can be given decoders.

NCI is also working with various television stations across the country that have received grants to provide closed captioning of news programs. Part of the grant funds will be used to conduct decoder subsidy programs in the community.

COMPETITIVE SUBSIDIES TO INSTITUTIONS OFFERED BY ASSISTIVE DEVICE MANUFACTURERS

Some manufacturers provide subsidies to not-for-profit organizations serving disabled persons. Schools, voluntary organizations, hospitals, and rehabilitation centers may submit written applications to receive a specific

product or product line at a discount. These programs fall under the rubric of corporate contributions departments or appear within announced grant cycles. Manufacturers benefit by making their products available to groups of people who might otherwise lack access to such equipment in settings where these consumers are likely to receive instruction in its use. Two programs, offered by the Digital Equipment Corporation and the Tandy Corporation, were examined.

Digital Equipment Corporation's DECtalk Grant Program

The DECtalk Unit, manufactured by the Digital Equipment Corporation (DEC), is a voice synthesizer that translates electronic text into speech. Its retail price is $4,200. DEC received many inquiries from individuals with disabilities seeking access to the DECtalk Unit. It felt that by supplying non-profit organizations in the educational and health care sectors with the device, substantial numbers of people could be served. Under the DECtalk Grant Program, launched in 1986, nonprofit organizations receive an equipment grant totalling 67% towards the purchase of up to five DECtalk units.

Organizations submit a written application that identifies who they are, whom they serve, the types of assistance they provide to their target population, and whether they employ persons with disabilities. Questions are also posed regarding what computer systems and applications are utilized in the organizations, the proposed usage of the DECtalk Unit, and whether applicants are in contact with a DEC Sales representative. Applicants must include a copy of their current annual reports, charter statement, and federal tax exempt status information with the completed form.

Since numbers of machines available through the program are limited, DEC outlines its criteria for awarding grants in written materials sent to prospective applicants. For example, it seeks organizations that:

- are financially stable;
- conduct comprehensive, quality programs;
- serve a number of people with disabilities;
- need and can use equipment effectively.

DEC provides equipment grants towards the purchase of the DECtalk Unit. Software, delivery, installation, maintenance, and training costs are not included.

Not-for-profit organizations that receive equipment grants are notified of their award in writing; they have 60 days in which to act on it. They must return a signed purchase order to DEC to receive the system.

Successful applicants are asked to contact DEC after six months of experience with the DECtalk Unit. Approximately one fourth of the institutions file reports. Awardees are asked to comment on the equipment they have received and how it is being used within their organizations. DEC compiles this information to evaluate the impact of its subsidy program. Institutions that employ the DECtalk Unit successfully may be called upon to assist other potential awardees to ensure the appropriate use of the equipment.

In order to implement the grant program, the corporate contributions program worked with the marketing and sales department to understand what skills were needed to use the DECtalk unit properly. Since many vendors make software that is compatible with DEC's equipment, a certain level of sophistication is needed so institutions can employ the unit. Program staff commented on how important it is for grantors to know their product, and to develop an application form that ensures correct use. Additionally, DEC has a telephone number that allows callers to hear the DECtalk unit at work. Potential applicants and buyers are able to gain easy access to the sound of the voice synthesizer component of the equipment through telephone contact.

According to DEC, the grant investment has totalled $3.5 million. This program is well known within the computer industry, and about 90% of the institutions that apply for grants receive them. Many are repeat applicants who were awarded DECtalk grants in the past.

Tandy Corporation's Educational Grants Program

The Tandy Corporation/Radio Shack's Education Division instituted the Tandy Educational Grants Program in 1982, in response to a deluge of requests from organizations seeking donations of computers. The Grants Program is a formalized way of making microcomputers available in educational settings to institutions that have a well-defined need for the equipment and the know-how to use it effectively.

The Grants Program is competitive, as limited dollars are available to fund projects. Tandy publishes a topic and invites applications from educators on a semiannual basis. Usually from 100 to 110 applications are received, although when a topic is perceived as broad, many more organizations apply for funding (a recent RFP generated 400 proposals). Anywhere from 6 to 20 proposals receive an award in each grant cycle. More than 200 awards have been made since the program's inception, at a retail value of over $1.75 million. All grants are made in the form of Radio Shack computer software, hardware, course ware, or accessories (the Tandy product line) up to a current maximum of $5,000. The program does not subsidize training, maintenance, or repairs, other than the standard 90 day warranty period.

Several times, Tandy has focused on special education needs. For instance, in an early grant cycle, the subject matter covered in ten proposals that received grants was "the use of microcomputers to address specialized needs for education of the handicapped and disadvantaged." In a grant cycle several years later, the topic was "applications of microcomputers in special education." Thirteen awards were made at that time. Other topics may also draw applications from institutions serving disabled persons. For instance, "new and innovative uses of microcomputers" or "identifying and evaluating appropriate uses of microcomputers with at-risk students" are areas in which agencies working with disabled populations have competed and received awards.

All proposals include:

- a cover page that identifies the organization and the project under consideration;

- an abstract and an introduction that identifies the need and how the proposed project will address it;

- a needs assessment;
- the program objectives;
- activities;
- a proposal equipment list; and
- success measures.

Strong applications identify how project results will be disseminated, in-kind contributions, and appropriate hardware. Uniqueness and creativity are also factors the review board weighs.

The Tandy Educational Grants Review Board receives and reviews all completed applications. The Board is purposely kept uninformed regarding the identities of institutions that have applied for grants. That way, submissions are judged on merit alone. The Review Board decides which proposals will be funded, and the Grants Program informs winners.

Potential applicants learn about the program in many ways. Tandy sends out press releases to educational magazines and journals announcing grant cycles, and its sales force is aware of the initiative. The program is identified in many funding directories and corporate giving guides.

Although Tandy requests a report on funded projects after a year, some institutions fail to provide this information. No formal evaluation of this material has been conducted. The Educational Grants Review Board Chairman, Dr. Lee Droegemueller, Commissioner, Kansas State Department of Education, is compiling this information, and is considering how it may be used in the future.

SUBSIDIES TO INDIVIDUALS OFFERED THROUGH THE COLLABORATIVE EFFORTS OF BUSINESS AND VOLUNTARY ORGANIZATIONS

Several subsidy programs have developed as an outgrowth of partnerships struck between businesses and voluntary organizations. Although the formulas differ, businesses provide their products at a discount to disabled consumers through the voluntary organizations. These agencies have defined constituencies, and credibility with the populations they serve. In essence, they act as a conduit for businesses, providing them with easy access to an identified market.

The role of the voluntary organization varies, depending on the format of the subsidy program. Sometimes, it helps develop criteria to ensure that eligible individuals apply for and receive discounts. It may publicize the existence of the program, and process the necessary paperwork; or the organization may manage the program and provide direct services to the consumer, helping in equipment selection, testing, user training, and technical assistance via telephone support.

Through these programs, consumers with disabilities have access to specific discounted products. They may qualify to receive a discount because a physician has certified that they have a disability and could benefit from using the

discounted device that is offered. They may need to meet certain financial criteria to participate in the program. The purchaser is required to pay a defined portion of the cost of the equipment.

Businesses offer discounts for many reasons. Large companies with a general market base are able to absorb the costs of providing on-going discounts to a targeted group of disabled consumers. They seek to reach out to this population which is often difficult to identify and serve. They want to broaden their markets, and to be considered good corporate citizens for instituting such initiatives. Some businesses believe that the private sector has a role to play in making devices financially accessible to greater numbers of persons with disabilities. Different corporate perspectives and philosophical issues surrounding subsidy programs for assistive devices will be considered later in this document. Presently, several collaborative efforts between business and voluntary organizations will be examined. These relationships fall within several subcategories: formalized partnerships, voluntary organization initiatives, subsidies available through membership discounts, and non-competitive subsidies offered by a private non-profit organization created to market equipment at a discount.

SUBSIDIES MADE AVAILABLE THROUGH FORMALIZED PARTNERSHIPS BETWEEN BIG BUSINESS AND VOLUNTARY ORGANIZATIONS

Two major corporations, International Business Machines (IBM) and Xerox, have created formal relationships with voluntary organizations to implement subsidy or discount programs. IBM's program is already in place; the other, the American Foundation for the Blind, Inc.-Xerox/Kurzweil collaboration, is being implemented.

IBM's Discount Offering

In 1985, IBM established its National Support Center for Persons with Disabilities, an information and referral service designed to assist disabled persons in gaining access to information on computers and related assistive technologies that would contribute toward their independence. Building on that experience, IBM sought a means by which to make its Personal System/2 ®, features, and accessories available to disabled consumers at a discount. Concerned that the appropriate adaptive hardware and software to be used with the systems was as important as the system itself, IBM decided to work through community service organizations which have experience in this area. IBM began providing equipment at discounts ranging from 33% to 50% in the fall of 1987. The discounts do not cover maintenance or repairs.

Eligible applicants for the discount must be disabled U.S. residents capable of benefiting in a rehabilitative or therapeutic manner from using the computer. Organizations or family members cannot qualify for the offering. Applicants must agree not to remarket the computer within a year after purchase.

Since IBM sought to make the program national in scope and to serve people of all ages with all kinds of disabilities, it turned to national non-profit community service organizations (CSO's), whose rehabilitation focus met its needs. Initially, the pilot project was kept small, so IBM and the CSO's could

learn from and evaluate their experiences. Over time, IBM has contracted with the National Easter Seal Society, United Cerebral Palsy Associations, Inc., and the Courage Center to implement the program. These organizations are required to verify, through receipt of a licensed physician's letter, that the applicant for the IBM discount meets program eligibility requirements. The community service organizations must evaluate and can suggest to the applicant appropriate technology solutions, collect the recipient's payment for the discounted equipment, handle billing, receive the equipment, test it, set it up, offer a limited amount of familiarization training, and provide information on warranty options. IBM never reviews the documentation directly, all it requires is a copy of the completed purchase order.

The voluntary organization oversees the sale and initial training in the use of equipment purchased by consumers who are disabled. The organization assists consumers in purchasing and using discounted IBM equipment.

Only selected sites of Easter Seal and United Cerebral Palsy are part of this program. They must have an ongoing assistive technology program in place or a staff that is computer proficient to qualify to participate in the IBM offering. The IBM contract does not preclude participating organizations from selling non-IBM equipment. Sites receive a fixed fee from IBM for each system unit sold. Currently, the program exists in twenty-seven locations nationwide. IBM is beginning to focus on regional and local organizations that could qualify for participation in an expanded program.

Outreach is conducted by IBM's National Support Center for Persons with Disabilities in Atlanta, Georgia, and the networks of the participating community service organizations. News releases, and rehabilitation professionals also inform the public about the program. When an individual calls for information, a packet with sample materials on the program is sent.

In the pilot phase of the program, IBM and the participating sites gained valuable knowledge for strengthening the program. They found that the community service organizations had substantially underestimated the amount of resources needed to implement the program. Problems of staff turnover and the ever present problem of keeping abreast of changes in the technology marketplace required training manuals and sessions for personnel. The internal process of making and handling orders, and shipping needed to be expedited. These lessons could only be learned through program implementation.

Currently, follow-up is not systematically done. IBM has a toll free telephone number, and it is left to the consumer to call with compliments or complaints. Measures of success come in many forms. Telephone inquiries about the program and information packets mailed gauge the level of program awareness. The quantity of systems delivered shows the number of individuals directly served. While these are of assistance in determining the impact of the program, another important consideration is the appropriateness of the solution to the individual's needs. Therefore, other assessment methods are being considered.

American Foundation for the Blind, Inc. - Low Interest Loan Program for the Xerox/Kurzweil Personal Reader

The American Foundation for the Blind, Inc. (AFB) and Xerox Corporation/Kurzweil Computer Products, Inc. have created a low interest loan fund and discount program for the Kurzweil Personal Reader. This device is a computer-based

system that costs from $8,000 - $12,000; it translates typed print into synthetic speech. The low interest loan program was announced in February 1988. Applications for the program are now available to the public.

Both the American Foundation for the Blind and the Xerox Corporation have committed one million dollars each to the loan fund and are seeking additional corporate support for their efforts. These organizations recognized that the Kurzweil Personal Reader could help persons who are blind and severely visually impaired, but its cost is out of the price range of many who could benefit from it. Successful candidates are required to pay back the loan on the equipment at a reduced rate (5% below the market rate), but purchase the product at a 30% discount on its retail price. Recipients must place a 10% down payment on the Personal Reader in advance. The balance and interest may be paid over a 48 month period.

Eligible applicants are U.S. citizens who can demonstrate financial need. Applicants must also show why they need a Personal Reader in their educational, vocational, employment, or community service/volunteer pursuits. A complete application includes:

- verification of legal blindness;
- proof of U.S. citizenship;
- letters of support (from employers, rehabilitation counselors, academic advisors, etc.);
- a copy of the applicant's most recent tax return.

Applicants are required to document their intended use of the Personal Reader over the next four years, including an explanation of the kinds of materials they plan to read with the machine's assistance. They must also share information that aids the evaluators in determining their financial need (e.g., numbers of people in the household, annual income, total household income, etc.).

Applications are accepted throughout the year and are reviewed quarterly. Candidates are notified of their applications' status after that review. Loan awards are made once a credit check is conducted by the participating banking institution, the First Bank of Boston.

Outreach for the program, which has included press releases, newspaper articles, a television commercial featuring Stevie Wonder, and word of mouth, generated over 2,000 requests for applications as of the summer of 1989. Since there is little precedent for this type of effort that involves collaboration among three distinct entities (e.g., a business, a voluntary organization, and a bank), AFB believes it will "learn by doing."

VOLUNTARY ORGANIZATIONS TAKING THE INITIATIVE: BLUEPRINTS FOR EXPANDING COLLABORATIVE EFFORTS WITH CORPORATIONS

Two voluntary organizations, the National Easter Seal Society and the United Cerebral Palsy Associations, Inc., already actively involved in the IBM discount

offering, are seeking to develop partnerships with other computer and assistive device companies. Some of their affiliates provide information and referrals to their clientele on equipment. They want to help consumers make informed choices about technologies they are considering purchasing. By negotiating cooperative agreements with manufacturers of assistive devices, the national offices of these organizations are trying to make appropriate technologies available to those they serve at a discount. Consumers who are informed of these discounts by the voluntary organizations' networks may seek to purchase equipment through their local chapters or affiliates.

National Easter Seal Society Computer Assisted Technology Services (CATS) Model Program

The National Easter Seal Society is working to develop a network of resource centers that can assist consumers with disabilities in selecting and using computer technologies capable of promoting their independence and productivity. Easter Seal affiliates must qualify to participate in the model program. The role of the Easter Seal national office is to provide technical assistance to members of the resource network, coordinate efforts in working with corporate co-sponsors and technology partners and to set up price agreements with vendors. Local programs will assist in evaluating the technology needs of consumers with disabilities, identifying appropriate hardware, software and other equipment needs, facilitating the acquisition of devices for end-users, installing equipment, orienting consumers to the products they purchase, and sharing on-going technical assistance. Through national agreements, Easter Seal will attempt to provide discounts on software and hardware. In a sense, Easter Seal is seeking dealer rates that it can pass along to the people it serves. Through the resource network concept Easter Seal gives manufacturers access to consumer groups that are often difficult for them to reach. By negotiating such agreements with several companies, Easter Seal aims to provide customized services to its clientele. It does not attempt to usurp the market of traditional dealers. Rather, the CATS resource network system can assist end-users whose needs are not usually met by dealers.

This program is in its preliminary stage. A draft document outlining this model was circulated within the National Easter Seal Society in April, 1989.(4)

The United Cerebral Palsy Associations, Inc.'s Collaborative Efforts with Manufacturers of Assistive Devices

Recognizing that a variety of products are beneficial to persons who have cerebral palsy, The United Cerebral Palsy Associations, Inc. contacts manufacturers to develop partnership programs. Collaborative efforts take many forms including equipment loans, training programs for professional staff, or discounts on assistive devices.

A letter of cooperation is created, delineating what the agreement entails, and whether it is time-limited. Various products are covered under such agreements. For example, the United Cerebral Palsy Associations, Inc. has negotiated discounts on toys, wheelchairs, computers, head pointer systems, special clothing, and such activities of daily living (ADL) products as bathing chairs.

Affiliates are informed of the discount programs through weekly mailings by the national office. Sometimes, affiliates are selected to participate in a discounting program (as in the case of the IBM initiative). Other times, it is the chapter's responsibility to pass along information on discounts to its clientele. Whether a discount is publicized and made available to UCPA clientele within a given area will vary, depending on the capabilities of the affiliate. No reporting system exists that requires affiliates to inform the national office as to whether they are actively promoting discount programs.

Evaluation of these efforts has not been initiated. United Cerebral Palsy Associations staff believes that information on numbers of devices sold or who uses them is not necessarily a measure of success. UCPA's goal is to develop ongoing relationships with manufacturers that may have an impact on the way products are designed and made available so that its clientele have ready access to the equipment.

SUBSIDIES AVAILABLE THROUGH MEMBERSHIP DISCOUNTS

Another type of subsidy program is the membership discount. Several businesses, either manufacturers or retailers, provide discounted products to members of specific voluntary organizations. These price markdowns serve a dual purpose: They may be viewed as a benefit of joining these membership groups and they provide visibility for the cooperating retailer or manufacturer as a "good corporate neighbor." Pharmaceutical discounts may fall under this rubric, and both programs examined include a medication benefit, but the two examples cited focus on price reductions for assistive devices.

LeRoy Pharmacies (Accuhealth, Inc.) and the New York City Chapter of the Alzheimer's Association Discount Membership Plan

In the spring of 1989, LeRoy Pharmacies, a New York City based drugstore chain, introduced a subsidy program. Its plan was to provide a 30% discount on the normal prescription price of medications and a 10% discount on all products in its Home Care Division (such as adult diapers, bathroom safety merchandise, eating utensils) not covered by Medicare or Medicaid to members of the New York City Chapter of the Alzheimer's Association. Members of the organization include persons with Alzheimer's disease and their families.

In order to receive a discount on the first purchase, individuals must identify themselves as current chapter members by showing their valid membership cards at the check-out counter. If they are not association members, they may pick up applications at the pharmacy, or contact the chapter to receive them. Once memberships are entered into the pharmacy's computer, orders may be made via telephone to the store which is initially used. Free delivery within the five boroughs of New York is available through this program. A home assessment by LeRoy Pharmacies Homecare Coordinator can be arranged to determine equipment needs.

The chain's discount program began when AIDS activists approached the company seeking assistance, and the AIDS organization networked with the local Alzheimer's Association. Accuhealth Inc. (the owners of LeRoy Pharmacies)

believes this program offers a worthy membership organization assistance in providing care to its target population. In addition the drugstore chain benefits in that Alzheimer's Association members will frequent its stores and buy non-discounted products as well, increasing its market base. The Alzheimer's Association gains from this form of collaboration, by offering potential members an incentive to join the organization.

Outreach for the program is conducted through the Alzheimer's Association newsletter, press releases, and in work the drugstore chain has done with local hospitals. The program has been well received.

LeRoy Pharmacies expects to expand its program to other organizations located within the New York City area. The chain has begun discussions with local affiliates or chapters of the United Cerebral Palsy Associations, the American Diabetes Association, and some hospital-based clinics.

Evaluation procedures for the program have not taken shape. LeRoy Pharmacies hopes to establish a reputation as a drugstore chain with an expertise in caregiving issues that helps people save money.

National Spinal Cord Injury Association Pharmacy and Medical Products Program

The National Spinal Cord Injury Association (NSCIA) is a membership organization that focuses on the medical and social problems that result from spinal cord injury. Along with publications and educational materials, those who join the association have access to pharmaceutical and medical products discounts through agreements NSCIA has created with America's Pharmacy Inc. of Des Moines, Iowa, and Consolidated Products and Services (CP&S). NSCIA developed these services in response to members' needs. In particular, chapter members who live in rural areas often have limited access to inexpensive quality products that NSCIA is able to offer through its program.

Consolidated Products and Services offers leg and bed bags, and a chemical cooling pad at discounts to NSCIA members. Before purchasing these products, members have the option to receive free samples, so consumers have the opportunity to test these devices before purchasing them at wholesale discount prices.

Although NSCIA does not have a formal evaluation process for its medical products benefits program, it seeks suggestions from its members on how the program can be improved and strengthened. Because of member recommendations, CP&S conducts pressure tests of all leg bags for quality control. Consumer input also generated the ideas of providing sample products to members and case price purchasing.

Providing products at a discount that many NSCIA members use is a tangible benefit of joining the organization. This may be an additional incentive to retaining and sustaining NSCIA members.

CREATION OF A PRIVATE, NON-PROFIT ORGANIZATION THAT MARKETS DISCOUNTED EQUIPMENT

Instead of turning to established non-profit organizations to help implement and market subsidy programs, another form of collaboration between business and the non-profit sector is developing. New non-profit entities specifically

designed to market commercially available products to disabled consumers at a discount are being formed. One such program, created by Arkenstone, Inc., was examined.

Arkenstone, Inc.'s Subsidy Program

In March 1989, Arkenstone, Inc. was created as a private, nonprofit, charitable organization. Its mission is to provide a discounted reading system based on technology from Calera Recognition Systems customized for individuals with disabilities. Equipment available through the program is discounted to approximately 25% less than what is available in the commercial marketplace.

Arkenstone, Inc. is a separate entity from Calera Recognition Systems. The organization has received 501(c)(3) status in an Internal Revenue Service ruling.

In order to qualify for a discount, persons with disabilities should present a physician's letter or other documentation certifying their condition to Arkenstone dealers. The device is commercially available to the general public, but users with disabilities include those who are blind, visually impaired, dyslexic, or mobility impaired. Arkenstone requires prepayment for the reading system from dealers, and then has thirty days in which to pay Calera for the device. This ability to float payments provides Arkenstone with some financial support. The organization is also preparing proposals to conduct other programs to help individuals with disabilities.

The organization has been providing reading systems and has found rapid acceptance of the product within the visually impaired community. Arkenstone, Inc. expects to provide devices at a discount to approximately 100 to 200 people by the year's end.

Before Arkenstone began its operation, it sought advice from visually impaired commercial users of its reading system. Consumers recommended developing a strong dealership system, where those selling the device would focus on the provision of installation and support services; they also suggested creating and implementing timely distribution strategies for devices. Another suggestion Arkenstone used was to place Braille labels on disks. Arkenstone was pleased with these comments, and plans to continue to ask for consumer suggestions on ways to improve its products and service delivery system.

Outreach about the Arkenstone program is conducted through articles in publications serving the blind and visually impaired community, exhibits at national conferences of this target population, and through materials Arkenstone has developed. Word of mouth is also an avenue for outreach.

Obstacles to Arkenstone's efforts include limited staff and available funding, informing potential customers about the reading system, and providing them with opportunities to try it out. Since the program is new, it is not yet possible to discuss program outcomes.

EQUIPMENT REBATES THAT ENABLE INDIVIDUALS TO OBTAIN A PARTICULAR PRODUCT OR PRODUCT LINE

Another model to consider involves the provision of rebates to customers. Sometimes, companies subsidize devices that they do not manufacture or sell.

The discounted equipment makes the manufacturer's commercially available product accessible to users with disabilities. A business may provide a rebate, e.g., a return of a part of the payment, for this equipment which enhances the capabilities of a disabled consumer to use its products.

Chrysler's Rebate Program: Physically-Challenged Customer Assistance Program (P-CAP)

Spearheaded by the concerns of a longtime Chrysler car dealer who is disabled, Chrysler Motor Company examined what it could do to assist drivers and passengers with physical impairments. The company found that consumers with disabilities were uninformed about adaptive equipment for vehicles, training in its use, and ways to help finance it. To respond to these information gaps, the Chrysler Corporation created its Physically Challenged Resource Center in 1987.

Besides providing information and referrals to the driving public about disability issues, Chrysler offers financial assistance to owners of new Chrysler cars, trucks, and vans who install adaptive driving aids and conversion equipment in their new vehicles. The driver, or another member of the household, may need the equipment.

An individual purchases a new Chrysler vehicle and takes the car to an after-market resource to have it fitted or supplied with certain equipment. The consumer pays for these devices out of pocket, and then submits the receipt with an application to Chrysler. The company also covers the transfer of equipment into one of its new vehicles. A dollar for dollar reimbursement occurs, up to $500.

Products subsidized through this program include driver or passenger aids, such as wheelchair lifts, and hand controls. Some devices, not considered per se items (e.g., a running board) may require a physician's note certifying the disability and need for the specific type of equipment.

Chrysler receives from 1300 to 1400 calls monthly at its Resource Center. Chrysler has reimbursed at least 3600 purchasers of its products since the program's inception.

There is no specified evaluation component to this program. Chrysler receives thank you letters from satisfied consumers, but does not conduct any form of follow-up. Periodic internal reports are issued, but no standard of measurement must be met. Chrysler does not perceive its program as a sales gimmick, rather it is the corporation's way to provide services to persons with disabilities. The Resource Center enables people to tap into a network that may be able to assist them.

An important issue Chrysler faces in sustaining its program is its on-going effort to inform the public about its activities. Outreach is conducted through advertisements in specialty publications that focus on disability issues. Other methods include press releases, magazines, and word of mouth. The program has been the subject of television and radio shows. Good publicity is always needed for a program like this. Advertising is an efficient, although expensive way to keep consumers abreast of the assistance Chrysler provides.

It is interesting to note that in June 1989, another automobile manufacturer, Volkswagen, introduced a mobility access program that includes a discount component. The company is offering $1500 in purchase assistance to 1989 Vanagon buyers who procure the mini-van to transport a full-time wheelchair user who has a permanent disability. The program is being advertised in a videotape and in such publications as Accent on Living and Paraplegia News.(5)

DISCOUNTS ON TELECOMMUNICATIONS DEVICES AND SERVICES

Subsidies do not fall solely under the purview of non-profit organizations and for-profit businesses. Several monographs in this series and other publications have focused on government interventions that lower the cost of assistive devices.(6) The Americans with Disabilities Act (ADA), Title IV, Section 401, covers telecommunications relay services, methods that allow simultaneous contact to occur between individuals who use a TDD (Telecommunication Devices for the Deaf) or other non-voice terminal equipment and those who use telephones. Although ADA mandates access to such services nationwide, several states already support telecommunications relay services through surcharges placed on the monthly bills of telephone subscribers. Additionally, many provide telecommunications equipment to persons with hearing, speech, or other impairments at little or no charge.(7)

Other forms of telecommunications services are discounted for persons with impairments including touch-tone service, speed calling, directory assistance charge exemptions, and free operator assistance. A TDD user who makes long distance calls may apply to the local telephone company to receive discounts on AT&T telephone rates. Local telephone companies may provide similar discounts on short distance toll calls. Information on these discounts appears in local telephone directories. These efforts try to take into account that conversing via printed word takes longer than voice communication.

SPECIAL EVENTS WHERE MANUFACTURERS OFFER DISCOUNTS

Opportunities to promote a product before a large audience may encourage manufacturers to provide discounts as an incentive to potential customers. The possibility of bulk orders, in a market where such opportunities are rare, justifies price cutting. An example of this activity took place during the federally funded First National Teleconference on Technology-based Communication Aids and Assistive Devices that was organized by Educational TURNKEY Systems, Inc. and held on April 24, 1989. This program was broadcast to more than 400 sites nationwide, including schools, state education departments, and assistive devices centers. The teleconference included equipment demonstrations, and several manufacturers offered products at discounted rates to promote sales.

When new products enter the marketplace, manufacturers may develop discounted package deals to motivate consumers to buy their wares. These practices are common sales techniques, sometimes used within the world of assistive devices. For example, HumanWare Inc. announced two new braille printers, the Index Advanced Printer ($3795) and the Classic ($2895). HumanWare offered a $100 discount to anyone purchasing one of these new devices along with its product, the Ransley Braille Interface ($895). The discount was publicized in technology-related publications such as Closing the Gap.(8)

The preceding descriptions of program models and specific subsidy programs show the diversity of current offerings. Common features within the models were highlighted. It is time to consider the commonalties and differences among program models.

COMPARISON OF SUBSIDY PROGRAM MODELS: THEIR COMMON TRAITS AND DIFFERENCES

The subsidy programs described in this document share several common traits. All were developed in response to a pressing issue. The universe of available assistive devices for consumers with disabilities has grown dramatically within the past two decades. Equipment exists that can assist this target population to engage more fully in vocational, educational, and leisure pursuits. The participating organizations recognized this need for technology, but understood that cost is often an obstacle to use and ownership of equipment by people with disabilities. Some identified this problem through formal study; others, through experiences with their clientele. In fact, several subsidy programs were the outgrowth of information and referral efforts developed by non-profit organizations or device manufacturers. Subsidy programs are an answer to the multifaceted problem of providing technologies to those with disabilities who may have problems financing such devices. All programs aim to lower the cost of technologies to end-users.

Certain components appear in all subsidy programs. For instance, each organization that sponsors a discount program conducts outreach to inform interested parties about its efforts. Most rely heavily on word of mouth. Some advertise in specialty publications or through their own newsletters. Others receive publicity through device manufacturers, state vocational rehabilitation agencies, hospitals, or other organizations serving potential applicants. All have developed application procedures to deal with the influx of requests they receive from consumers. They provide potential applicants with either written and/or verbal guidance to ensure an orderly response from interested candidates.

Program structure varies, depending on the parties involved and the products subsidized. In some of the models explored, the discount provider is a non-profit organization, a device manufacturer, or retailer that makes the subsidy directly available to the end-user. In other models, a voluntary organization acts as the middleman between the business offering a discount and the consumer with the disability. The organization is there to provide information and assistance to the purchaser in a supportive dealership role. Additionally, some programs only cover a specific product or product line, while others are quite flexible about equipment they are willing to subsidize. These variations reflect the diverse nature of the participating organizations, and how they fund their efforts.

Eligibility requirements differ among programs. Several organizations target specific categories of persons or institutions whom they will consider for receipt of subsidies. Some include age or residency restrictions. Several programs developed by corporations, such as the IBM or Chrysler efforts, or non-profit organizations, as diverse as UCP of Western New York or Arkenstone, attempt to cover a larger cross section of persons with disabilities. Several define eligibility on the basis of a medically certifiable disability and perhaps the ability to benefit from the use of a device. Others make membership

in a specific voluntary organization a prerequisite for receiving discounted products. Much depends on how the participating organization defines the nature of its mission in providing technologies to persons with disabilities, their funding sources, and what kinds of products they are able to discount.

The role of the consumer differs among program models. In the Chrysler program, an individual purchases a new Chrysler product and then decides how to make it accessible through the acquisition of adaptive equipment. A rebate is available on these accessories. In the competitive grants subsidy programs offered by non-profit organizations, the applicant identifies his/her own needs, researches what type of equipment is suitable and why, identifies its cost, and explains how the device will assist in the pursuit of a specific goal. Some programs require outside evaluations of need; others give that responsibility to the applicant. Limits exist on the number of proposals that can receive funding, so well-designed proposals are most likely to succeed. Other competitive subsidy programs that target a product or product line also require thoughtful proposals. The difference here is that only given devices are the subject of the offered subsidy. This is also the case in non-competitive discounts available to individuals through collaborative efforts of businesses and voluntary organizations.

Payment schemes within subsidy programs differ. Organizations may supply complete funding for a device or they may make the equipment available at a lower cost. Some place dollar limits on the amounts of subsidies they will provide; others do not. Additionally, some programs seek to help those unable to find resources elsewhere, while others are willing to help pool resources to allow awardees access to technologies.

Evaluation of subsidy programs is limited, if it exists at all. Many organizations focus on using their often scarce resources to help people obtain technologies directly. Evaluation is perceived as a luxury they cannot afford. Others are interested in conducting more formal program evaluations and are attempting to develop workable protocols. Many program staff seem satisfied that the quantity of submitted applications and the number of subsidies they provide are increasing. Informal comments from awardees are the most common response subsidy programs receive.

OBSTACLES TO SUBSIDY PROGRAM DEVELOPMENT, IMPLEMENTATION, AND EVALUATION

An examination of existing subsidy programs shows their diversity. Most of the programs chronicled are relatively new. What can be learned from their experiences? What obstacles exist to developing, maintaining, and sustaining such initiatives? What issues should an organization consider when planning such a program?

Sponsoring agencies must lay the groundwork that will support the development of a subsidy program. Recognizing its own particular history and capabilities, the organization must have a clear understanding of who it seeks to serve, what discounted devices it will provide, by what process these subsidies will be made available, how this information will be conveyed to the public, and how the program will be administered, funded, and maintained. It is important to develop a realistic timeline for tasks that must be accomplished before the

program is put in place. For instance, IBM planned its program for more than a year before implementing it. In the year and a half of its existence, IBM and the community service organizations learned a great deal and resolved administrative concerns that can only be experienced after a program is in full swing. The American Foundation for the Blind/Xerox-Kurzweil program is being implemented, as of late September, 1989, after having been announced in February of 1988.

Raising money to support an on-going equipment program is a major concern. This is especially true for non-profit organizations that have no assured ways to replenish their funds. For-profit businesses also recognize the costs of the services they provide through their subsidy programs. Expenses are not limited to equipment alone. The provision of staff to administer a subsidy program, outreach efforts, publicity, and the provision of materials to potential applicants increase program costs, as do space and overhead. The National Captioning Institute's Project DARE is worth noting as an example of how funding influences a program's continued existence. This experience is not uncommon. For instance, Special Assistance Grants for equipment, once an active program of the Easter Seal Society of Iowa, Inc., are no longer available. Program funding ended.

Staffing a subsidy program is no easy task. Personnel must be knowledgeable about what a program provides. They must convey this information to interested parties to allay unrealistic expectations about a program. Staff members can also play a crucial role in encouraging worthy applicants to apply for subsidies. They can direct those who may be ineligible to other available resources. Since many subsidy programs have information and referral components, staff members need to be well-informed about appropriate technologies and the particular needs of the consumers they serve. They must also be able to respond to a deluge of requests in a timely manner. They may require on-going training and support so that they can assist consumers in accessing discounts appropriately. Staff turnover can be a problem in many organizations that offer subsidy programs.

Several individuals interviewed discussed the difficulties of learning about existing subsidy programs elsewhere. Information is often fragmented. Much more networking among programs could assist both new and existing efforts to assess their activities and needs.

Once a subsidy program is underway, how can a sponsoring organization measure its success? Subsidy program staff often cited the numbers of people served by programs who would not otherwise have access to technologies. Success measures seem focused on placing technology into the hands of end-users. Actually, information on the numbers of people served through these programs is sketchy. Many organizations seem hesitant to share that data. Perhaps they are unsure what message such figures convey, or maybe they sense those numbers do not show the full scope or impact of their activities. Some organizations also find this information difficult to track.

Success is often defined in qualitative terms. Some subsidy program staff mentioned their role in increasing public awareness on how technologies extend the capabilities of consumers with disabilities. Although amounts of information packets sent out and numbers of telephone inquiries made can be recorded, this type of success measure is difficult to quantify.

Program evaluation, as mentioned earlier, is rarely initiated. Limited follow-up is conducted to learn whether those who receive devices through subsidy programs actually use this equipment over time or what difference the device made in their lives. In the conclusion of this paper an examination of what kinds of research might prove useful for strengthening subsidy programs will occur.

Given the perceived need to assist persons with disabilities in gaining financial access to technologies, the number of currently existing programs is small. The difficulties that exist in planning, implementing, and sustaining such efforts have been highlighted. Philosophical issues supporting the creation of subsidy programs is another important area to consider. Manufacturers in the assistive devices field express differing perspectives on this subject.

PHILOSOPHICAL ISSUES RAISED BY PROVIDING SUBSIDIES FOR ASSISTIVE DEVICES TO PERSONS WITH DISABILITIES

Several manufacturers offer subsidies on their equipment to persons with disabilities. Often, these companies have large broad based markets that include the general public. They have the flexibility to provide subsidies to a specific target population (e.g., consumers who have disabilities) because they are able to absorb a lower profit margin within what is only a small segment of their market share. Many assistive device manufacturers, however, are smaller companies that only sell to this specialized market. Inherently, they receive less profit margin on their wares. Many are unable and philosophically unwilling to subsidize their products. They contend that if they offered discounts, such programs would decrease their profit margins even further. Under such circumstances, they could jeopardize their ability to stay in business and maintain the quality of their products and ancillary services.

All the manufacturers interviewed for this study recognized the need for alternative financing strategies for assistive devices. They supported the idea of giving individuals the opportunity to enter the marketplace so that they could have access to products that could improve their quality of life. Manufacturers are often a source of information to consumers about subsidy programs. They realize too that such programs "are like putting a Band-Aid on a big cut" and "have barely dented the need." However, several manufacturers raised concerns about providing subsidies because a person is disabled. They questioned whether such methods of financing reinforced negative stereotypes of disabled persons as dependent and unable to care for themselves. Discounts they contend, should be available to those who need them, not necessarily because of disability. They wondered about businesses' ability to design eligibility criteria for such programs.

Several companies preferred financing programs that featured low-interest revolving loan funds, or those that require the awardee to come up with a portion of the cost of the device. They felt it was important to convey the message that persons with disabilities are equally as responsible as their nondisabled counterparts. Banks need to be educated and programs should be developed that extend credit to this population which often finds it difficult to receive financing. They felt it was important to involve a potential awardee as an active participant in the procurement process, avoiding the taint of "charity" which could appear to be patronizing.

Subsidy programs exist in many different forms and serve a wide spectrum of people with disabilities. They all seek to help consumers become more independent and productive through access to technologies, whatever their philosophical base. What impact have these programs had on those who have received subsidies? Potential avenues for research that could strengthen existing subsidy programs and provide helpful guidelines for organizations preparing to implement such efforts in the future will be explored.

THE IMPACT OF SUBSIDY PROGRAMS ON CONSUMERS WHO RECEIVE THEM

What makes a subsidy program successful? How does this financing mechanism affect the lives of those who receive equipment through such means? Often, answers are based on anecdotal evidence, the testimonies of people who have received equipment. Awardees send thank-you letters to the sponsoring organization, or provide information that they have found or retained a job through the use of equipment. They may also register complaints about a program. However, because of limited funding and staff, subsidy recipients are not usually followed over a period of time. Do subsidies allow consumers to accomplish what they want to do with the assistance of equipment? We assume so, but concrete data is scarce.

It is also difficult to discern how widespread knowledge is about available subsidy programs. Data on who and how one learns about programs, or what influences them to or deters them from applying for subsidized equipment is unclear. Although all the parties contacted for this study commented on the increasing numbers of consumers interested in and receiving financial assistance to procure technology, questions that would provide insights into program strengths and limitations remain unanswered. For instance, how many people are aware of the existence of these subsidy programs? Who benefits from their implementation? What proportion of people could benefit but are not served? Besides possible funding limitations, why are they not served?

Other research issues might prove useful for strengthening subsidy programs. Do certain program models encourage the use of procured devices more than do other initiatives? How often is equipment abandoned that consumers receive through such programs? How can appropriate matches between individuals and technologies be assured? Do consumers who apply for subsidies have realistic expectations of what is offered by the program and the technology they seek? What program structures support consumers and encourage such expectations?

Obviously, no single program model will meet the needs of all those seeking financial assistance to procure technologies. A variety of models has developed in response to a recognized and growing need. The newness of so many of these initiatives makes it difficult to define their outcomes. Much more study, observation, and experience with these programs are required to improve assessment of their short-term and long-term effects on consumers, organizations that sponsor subsidies, and companies that manufacture assistive devices. And dissemination of this information will assist existing programs and will stimulate the development of more efforts.

SOME FINAL THOUGHTS

Subsidies are one form of programmatic response to the needs of consumers with disabilities who can benefit from the receipt of assistive technologies. Although available programs are few, given the numbers of people who could benefit from such efforts, it is encouraging to see the growth of such financing strategies in recent years. Placing technologies into the hands of persons with disabilities is a laudable goal. It is still necessary to explore, in more detail and as time passes, what impact such programs have on all those involved.

FOOTNOTES

1. See Attachment II of this document.

2. See Markowicz, A. and Reeb, K.G., "An Overview of Medicaid Reimbursement for Rehabilitation Equipment in the United States," (Washington, D.C.: Electronic Industries Foundation, 1988), Reeb, K.G. and Stripling, T.E., "Payment for Assistive Devices by the Veterans Administration," (Washington, D.C.: Electronic Industries Foundation, 1989), and Reeb, K.G., "Enhanced Consumerism within Commercial Rehabilitation Products: A Goal for Independent Living," (Washington, D.C.: Electronic Industries Foundation, 1986).

3. For information about the United Cerebral Palsy of Central Indiana, Inc.'s subsidy program, contact Helen K. Byer, UCP of Central Indiana, Inc., 615 N. Alabama Street, Room 322, Indianapolis, IN 46204, Tel. No. (317) 632-3561.

4. National Easter Seal Society Computer Assisted Technology Services, "Model Program Introduction," an April 12, 1989 draft document, (Chicago, Illinois: The National Easter Seal Society).

5. For more information about the Volkswagen initiative, contact the Mobility Access Program, Volkswagen United States, Inc., P.O. Box 2007, Bloomfield, MI. 48303-2007, Tel. No. 1(800) 444-VWUS.

6. See Footnote 2.

7. For more information about specific programs, readers can consult the monograph, "Financing the Purchase of Devices for Deaf and Severely Hard of Hearing People: A Directory of Sources" available from the Scientific Communications Program of the Galludet Research Institute, September, 1989.

8. "HumanWare, Inc. releases two new braille printers," Closing the Gap, June/July, 1989, vol. 8 No. 2, page 29.

LISTING OF SUBSIDY PROGRAMS

COMPETITIVE SUBSIDY PROGRAMS

Associated Services for the Blind
Electronic Aids Program
919 Walnut Street
Philadelphia, PA 19107
Contact: Paula Oto (215) 627-0600 ex. 229

Braille Institute of America, Inc.
Sensory Aids Financial Subsidy Program
741 North Vermont Avenue
Los Angeles, CA 90029
Contact: Marguerite Guardino (213) 663-1111

Opportunities for the Blind
P.O. Box 660
California, MD 20619
Contact: Robert E. Johnson (301) 475-5312

Foundation for the Advancement of the Blind, Inc.
4058 Moore Street
Los Angeles, CA 90066
Contact: David E. Weddle (213) 301-0344

Blind San Franciscans, Inc.
2417 Greenwich Street
San Francisco, CA 94123
Contact: Jewel McGinnis (415) 563-4896

United Cerebral Palsy Association of Western New York, Inc.
Western NY Resource Center for Applied Technology
7 Community Drive
Buffalo, N.Y. 14225
Contact: Katie Fava (716) 894-1432

The National Captioning Institute, Inc.
5203 Leesburg Park
Falls Church, Va. 22041
Contact: Don Thieme (703) 998-2400

COMPETITIVE SUBSIDIES AVAILABLE THROUGH DEVICE MANUFACTURERS

Digital Equipment Corporation
DECtalk Grant Program
111 Powdermill Road
Maynard, MA 01754-2571
Contact: Jane Hamel (508) 493-6550

Tandy Educational Grants Program
1600 One Tandy Center
Fort Worth, Texas 76102
Contact: Jamie Alexander (817) 390-3053

SUBSIDIES MADE AVAILABLE THROUGH THE COLLABORATIVE EFFORTS OF BUSINESS AND VOLUNTARY HEALTH ORGANIZATIONS

IBM National Support Center for Persons with Disabilities
P.O. Box 2150
Atlanta, Ga. 30055
Contact: Theodore J. Drazuk (404) 238-4642

American Foundation for the Blind, Inc.
Low Interest Loan Program for the Xerox/Kurzweil Personal Reader
15 West 16th Street
New York, NY 10011
Contact: Mark Uslan (212) 620-2041 or (800) 232-5463

Computer Assisted Technology Services
Easter Seals Systems
5120 South Hyde Park Blvd.
Chicago, IL 60615
Contact: William Salyers (312) 667-8626

United Cerebral Palsy Associations, Inc.
1522 K Street, NW, Ste. 1112
Washington, DC 20005
Contact: James Hollohan (202) 842-1266 or (800) USA-5UCP

LeRoy Home Healthcare
342 East 23rd Street
New York, NY 10010
Contact: Rosalind Chambers (212) 473-5750

National Spinal Cord Injury Association
600 West Cummings Park, Ste. 2000
Woburn, MA 01801
Contact: Janna Jacobs (617) 935-2722 or (800) 962-9629

Arkenstone, Inc.
P.O. Box 4538
2500-B Augustine Drive
Santa Clara, CA 95054
Contact: James R. Fruchterman (408) 727-3434

Chrysler Motors
Physically-Challenged Resource Center
P.O. Box 159
Detroit, MI 48288-0159
Contact: John N. Martel (800) 255-9877

Educational TURNKEY Systems, Inc.
256 North Washington Street
Falls Church, Va. 22046
Re: Telecommunications Conference on Technology Based Communications Aids and Assistive Devices
Contact: Charles L. Blaschke (703) 536-2310

Attachment I

Exploration of Subsidy Programs for Assistive Devices
Questionnaire Used in Research on Existing Initiatives

1. Does your company/organization have such a program in place?
   Yes_____ What made you decide to develop the subsidy program intially? Did you conduct any market studies that identified a target population in need of subsidies? Why do you feel a subsidy program is needed?
   No_____ Why?

2. What form has the program taken?
   Collaboration with voluntary organizations_____
   Outreach to individuals with disabilities _____
   Other (Please identify)_____

3. What programs are subsidized? Amount of subsidy?

4. How is the program funded?

5. Who is eligible to participate (e.g., are there age, education, degree of disability, residency, or income requirements)?

6. Is a contribution from the recipient required? How much?

7. How long has the program been in operation?

8. How many people have been served? (Request breakdown of numbers.)

9. What are the total subsidies provided annually?

10. How is outreach conducted?

11. What is the application/evaluation process for subsidy recipients?

12. What kind of follow-up, if any, occurs for those who have received subsidies?

13. Are there subsidies that cover maintenance, repairs, training?

14. Is periodic evaluation a component of your program? How is it conducted?

15. How do you measure success in your subsidy program (numbers served, program growth, ability of consumer to benefit at work, at school, and/or at home from the subsidized technology, other)?

16. What are the advantages of such a program (good public relations, product exposure, increased sales, other)?

17. What obstacles exist regarding the implementation of subsidy programs (administrative burdens, outreach, finding qualified applicants, difficulties matching persons to technologies subsidized, other)?

18. Can you send written materials about your program?

19. Can you suggest others I can contact who have implemented or are considering implementing subsidy programs? Do you know of organizations that have decided not to implement subsidy programs or that have discontinued efforts to subsidize their products? Please identify them.

20. Based on your experience, do you have any additional thoughts that you would like to share on ways to develop, implement, and/or evaluate a successful subsidy program? What suggestions do you have that might help others to avoid pitfalls in program devlopment, implementation, and evaluation?

Attachment II

Electronic Industries Foundation

Monographs on Alternative Payment

Strategies for Assistive Technology

"An Overview of Medicaid Reimbursement for Rehabilitation Equipment in the United States," Arlene Markowicz and Kenneth G. Reeb, Jr., April 1988.

"Assistive Financing for Assistive Devices: Loan Guarantees for Purchase of Products by Persons with Disabilities," Kenneth G. Reeb, Jr., January 1989.

"Funding for Assistive Technology and Related Services: An Annotated Bibliography," Alexandra Enders, March 1989.

"Payment for Assistive Devices by the Veterans Administration," Kenneth G. Reeb, Jr., and Thomas E. Stripling, January 1989.

"Private Insurance Reimbursement for Rehabilitation Equipment," Kenneth G. Reeb, Jr., February 1987.

"Revolving Loan Funds: Expanding Equipment Credit Financing Opportunities for Persons with Disabilities," Kenneth G. Reeb, Jr., June 1987.

'Subsidy Programs for Assistive Devices," Carolyn Ward, September 1989.